

Fig. 1

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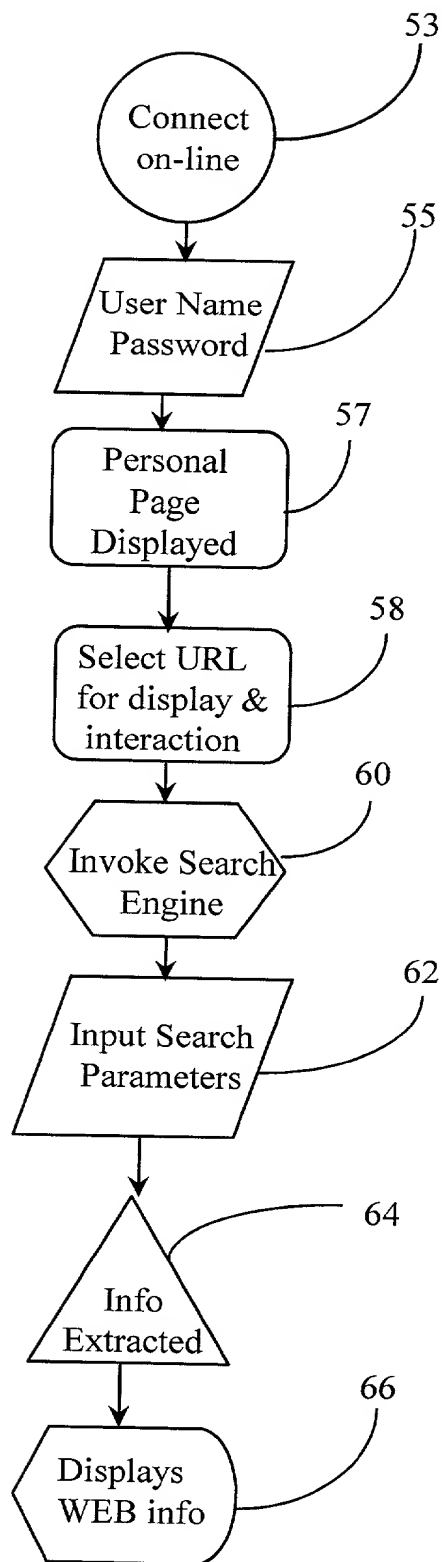
Internet Portal.com (personalized page)

Search	Server Name	User Name	Password
Agent	LBC.com	John Doe	XXXXXXX
Last	My Bank.com	John R. Doe	XXXXXX
Update	My Stocks.com	John R. Doe	XXXXXXXXXX
ADD	My Shopping.com	Jane L. Doe	XXXXXXX
	Mortgage.Com	John/Jane Doe	XXXXXXXXXXXX
	Airline.com	John Doe	XXXXXXX

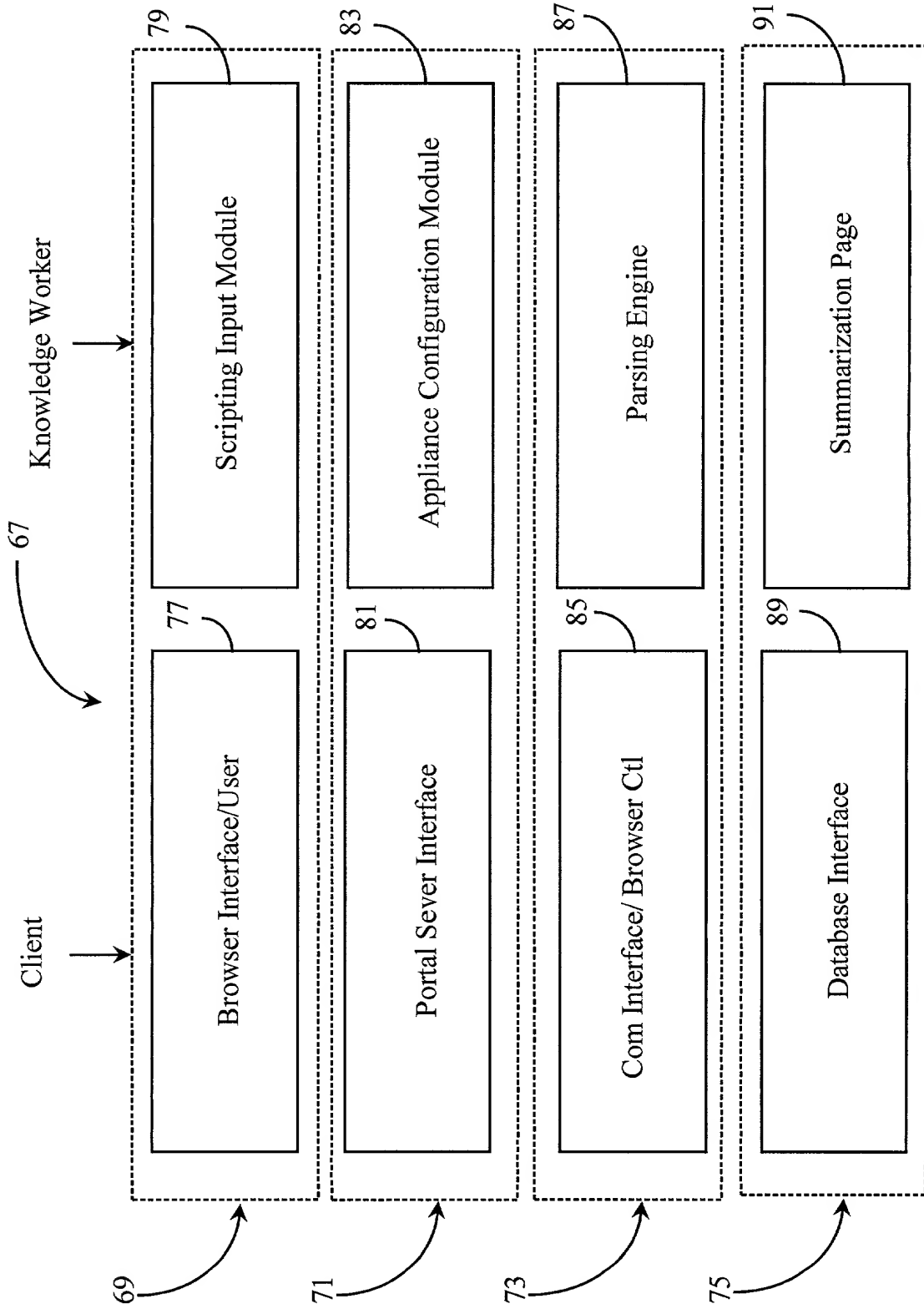
Search String  51

52

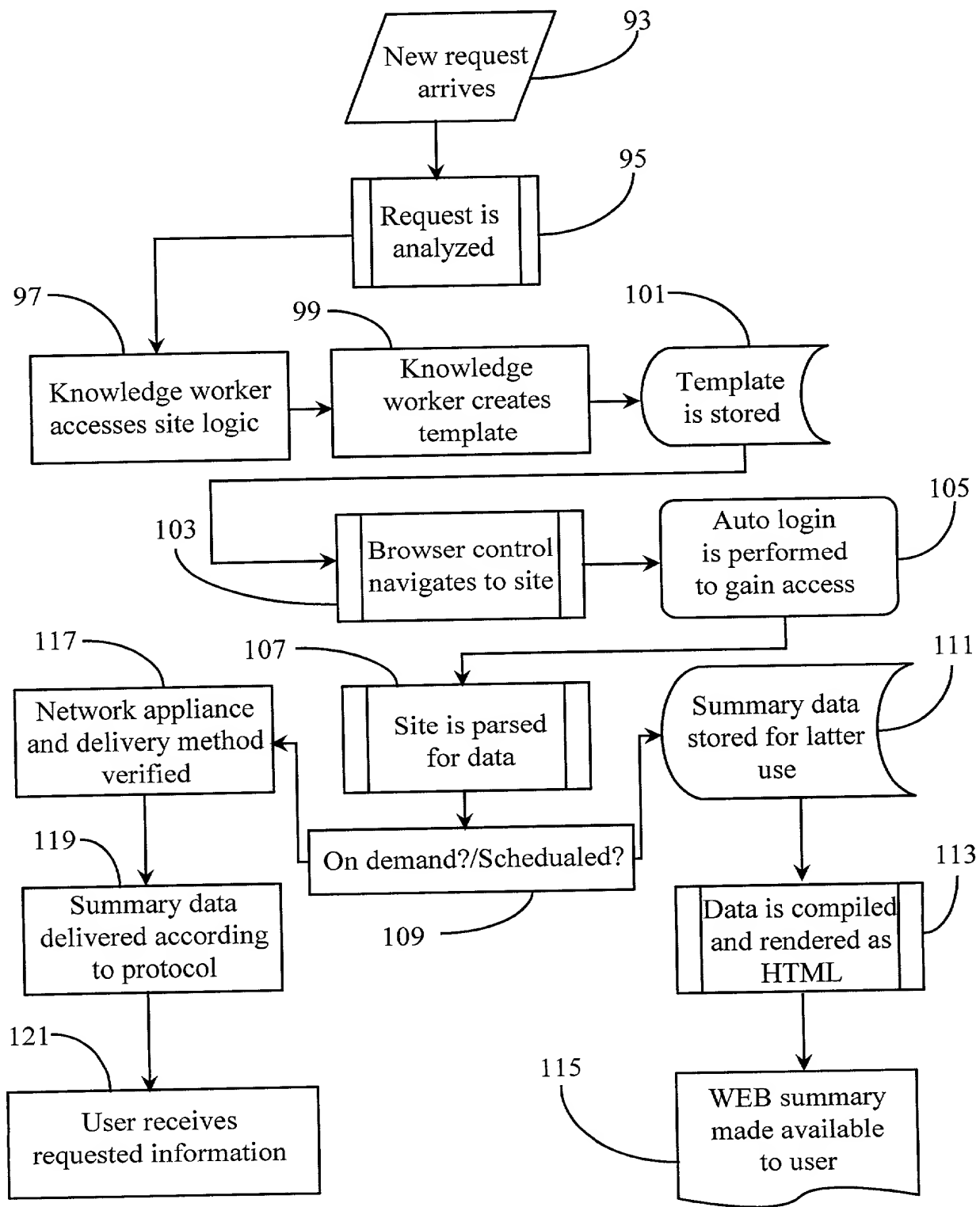
Fig. 2



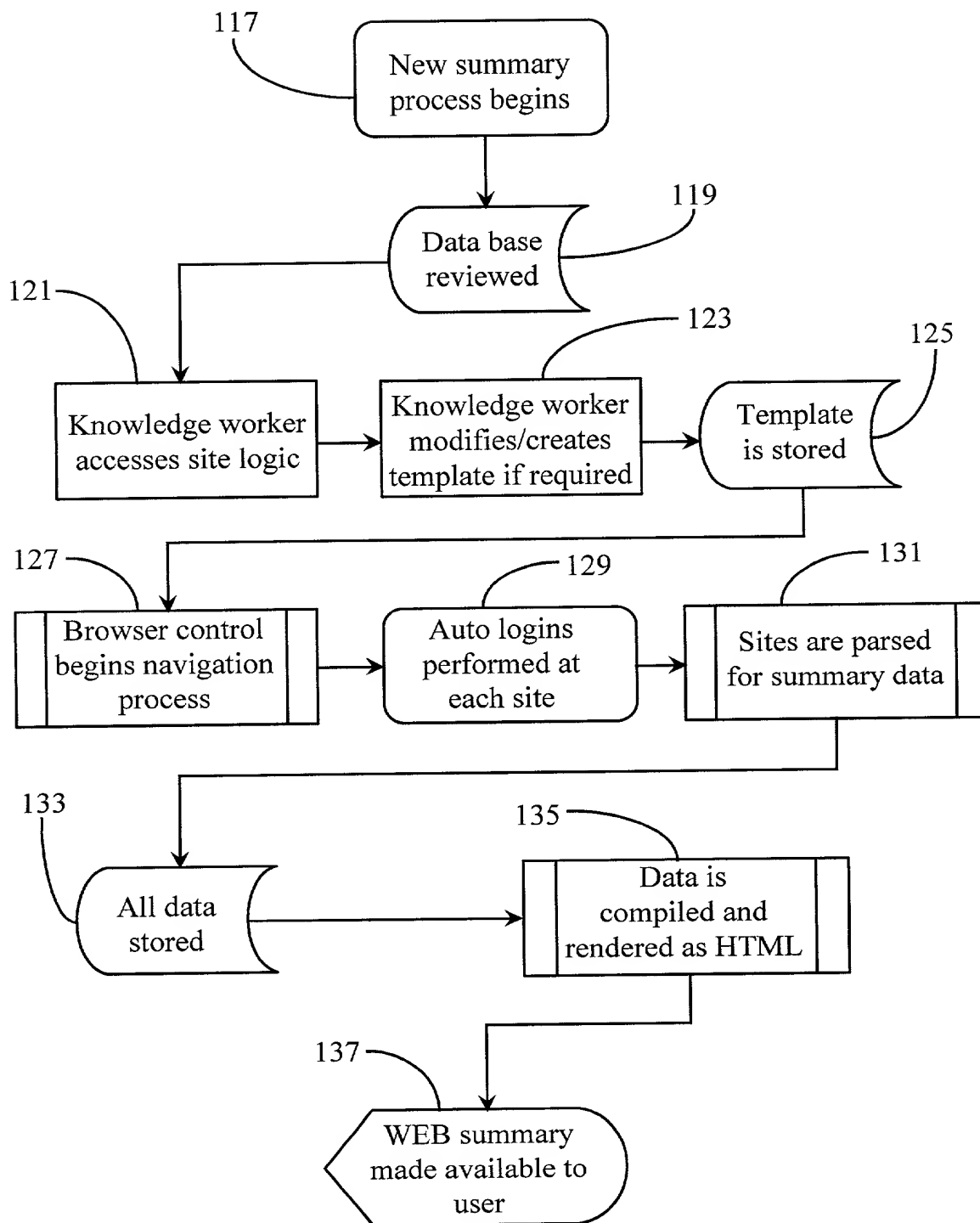
**Fig. 3**



**Fig. 4**



**Fig. 5**



**Fig. 6**

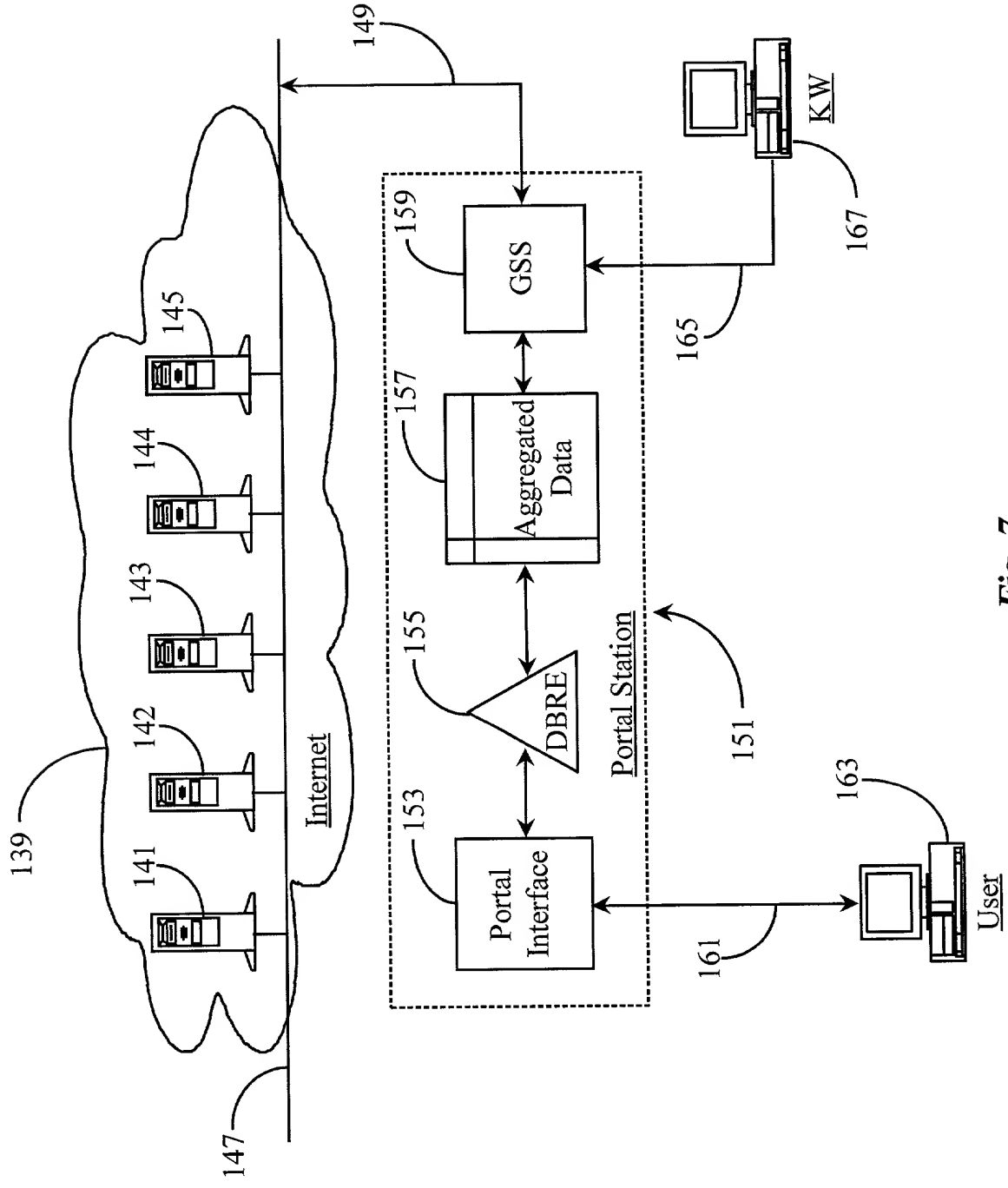


Fig. 7

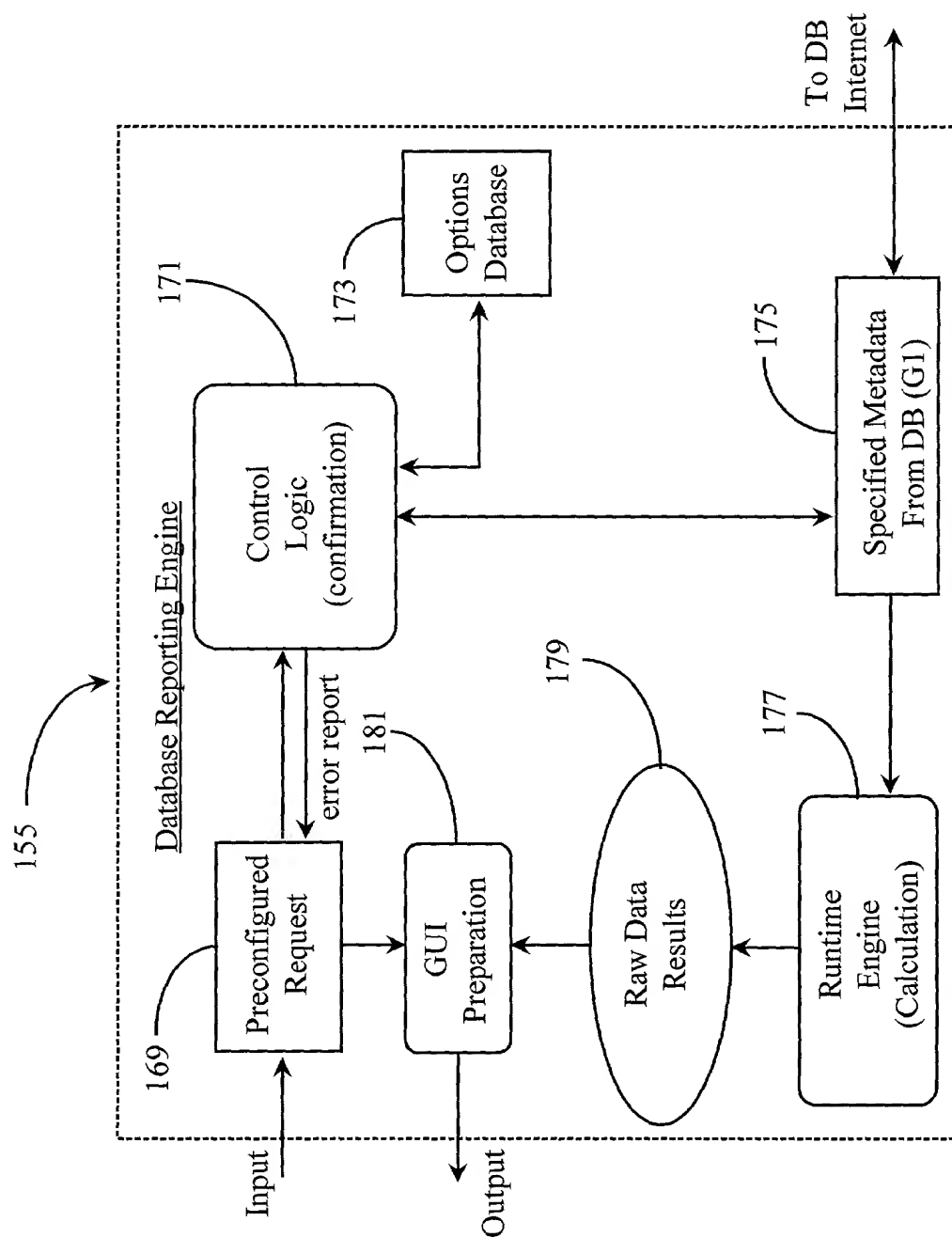
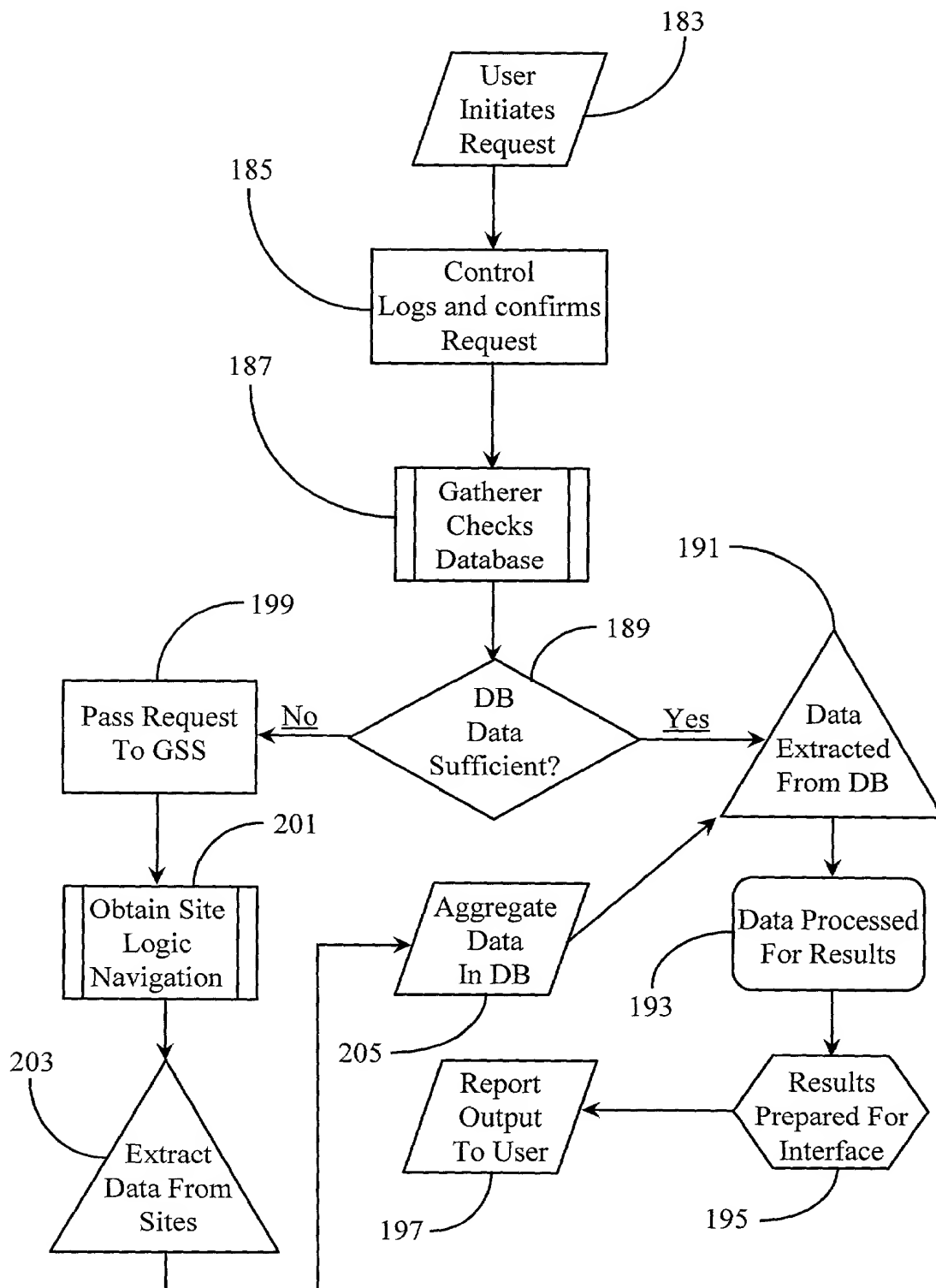


Fig. 8



FIG. 9



**Fig. 9**

207

Personal's Yodlee - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Related

Address http://sunserver.20000/magic/login?url\_anchor=b174b4vml\_tab\_id=451b174b

**Banks**

Stanford Federal Credit Union

Account	Balance
Savings - 1	0.15

Last Refresh: 8 days ago - Refresh

Wells Fargo

Account	Balance
CHECKING	34973.92
CHECKING	35457.68
MRA	40779.89
SAVINGS	101.60

Last Refresh: 8 days ago - Refresh

Bank Summary

Summary	Amount
TOTAL BALANCE	111313.24

**Investments**

DATEK Online

Symbol	Quote	Quantity	\$ Change
CSCO	69	1	- 3/8
HLIT	112 3/8	1	- 4 5/16
portfolio_balance			N/A
Total Account Balance			2029.55

Last Refresh: 2 hrs ago

Investment Summary

Summary	Amount
TOTAL STOCK BALANCE	181.375
TOTAL ACCOUNT VALUE	2029.55

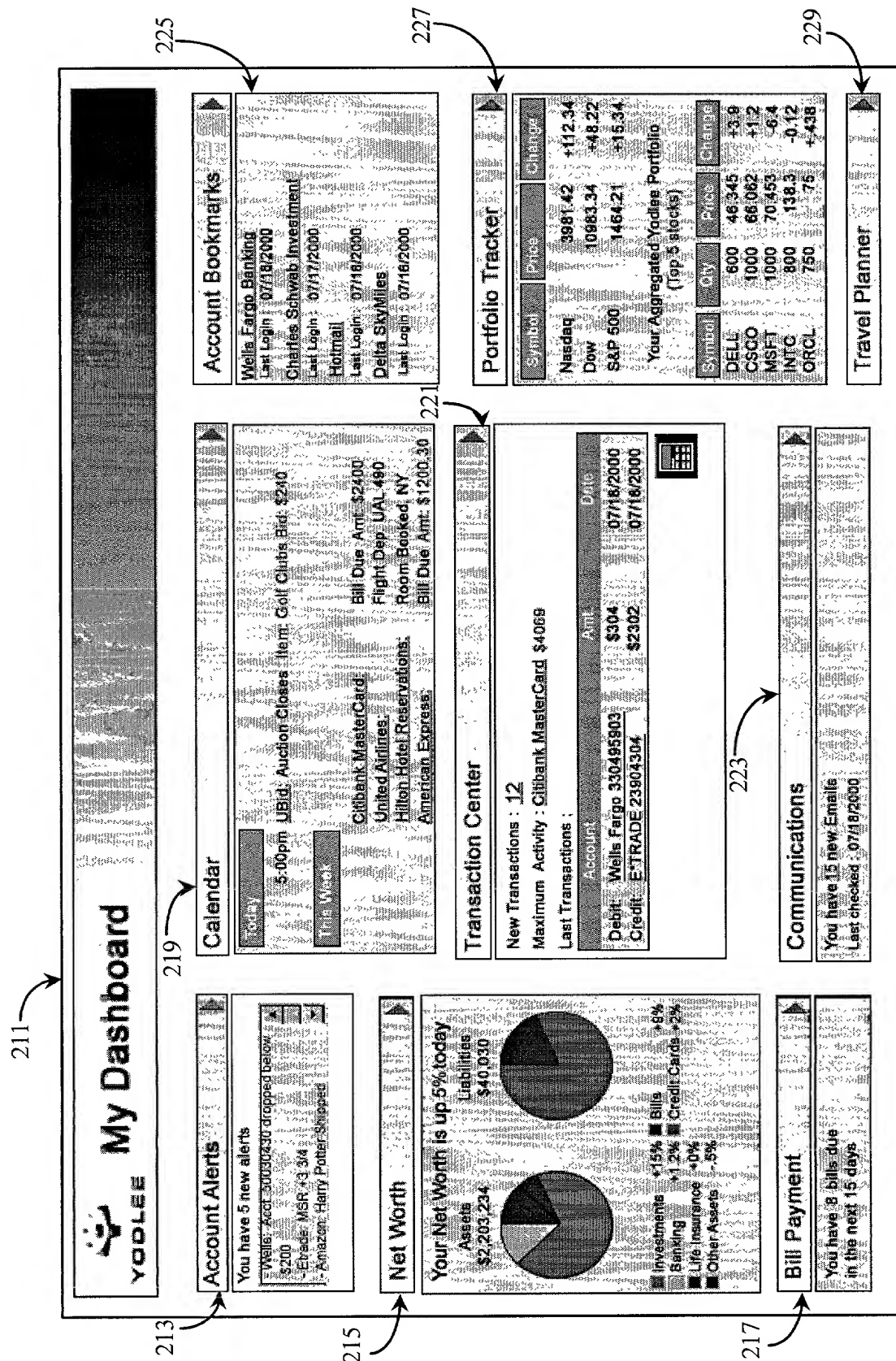
209

12:29 AM

Start Stop View Home Favorites History Mail Print Related

Local intranet

Fig. 10



**Fig. 11**

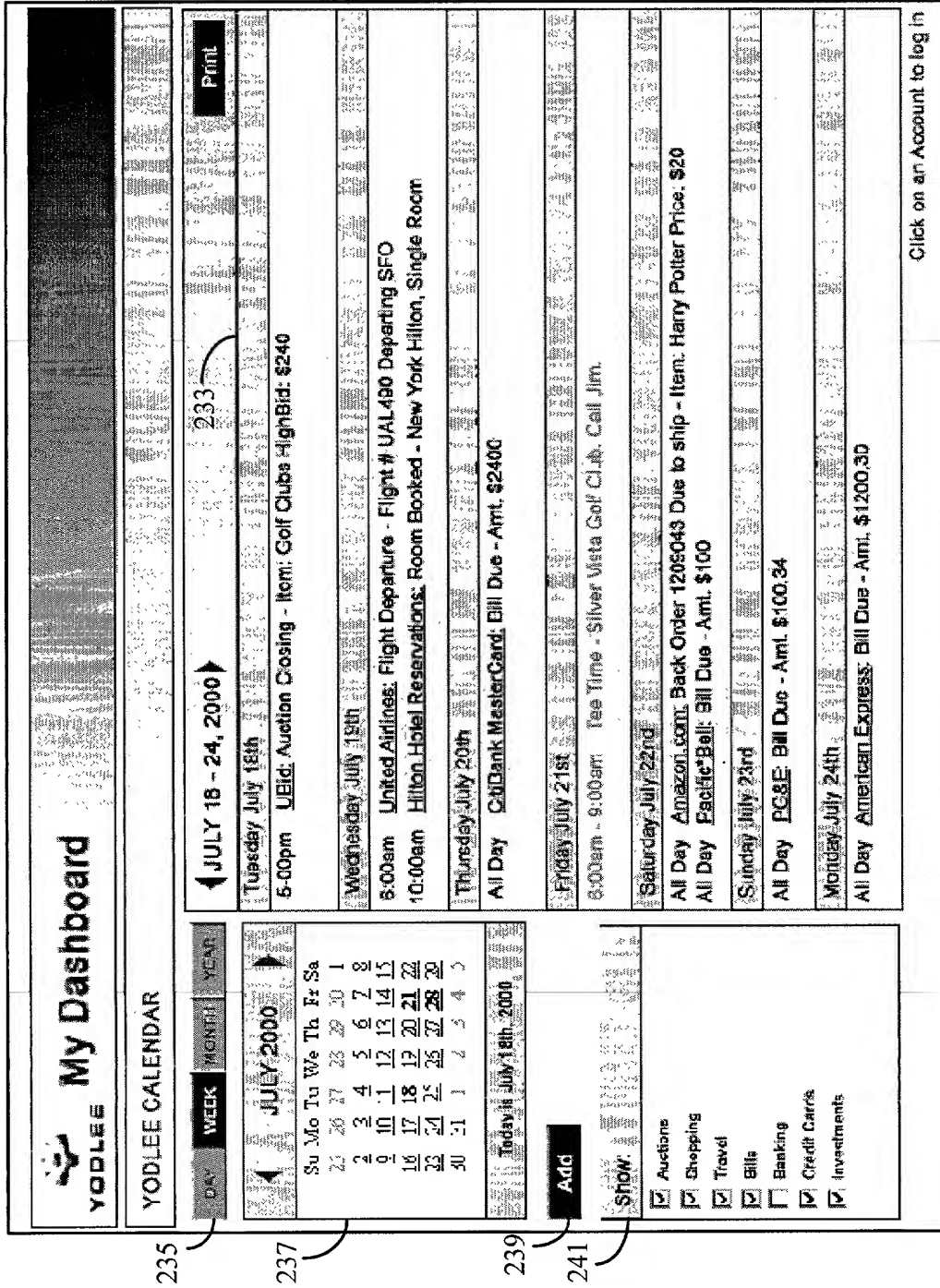
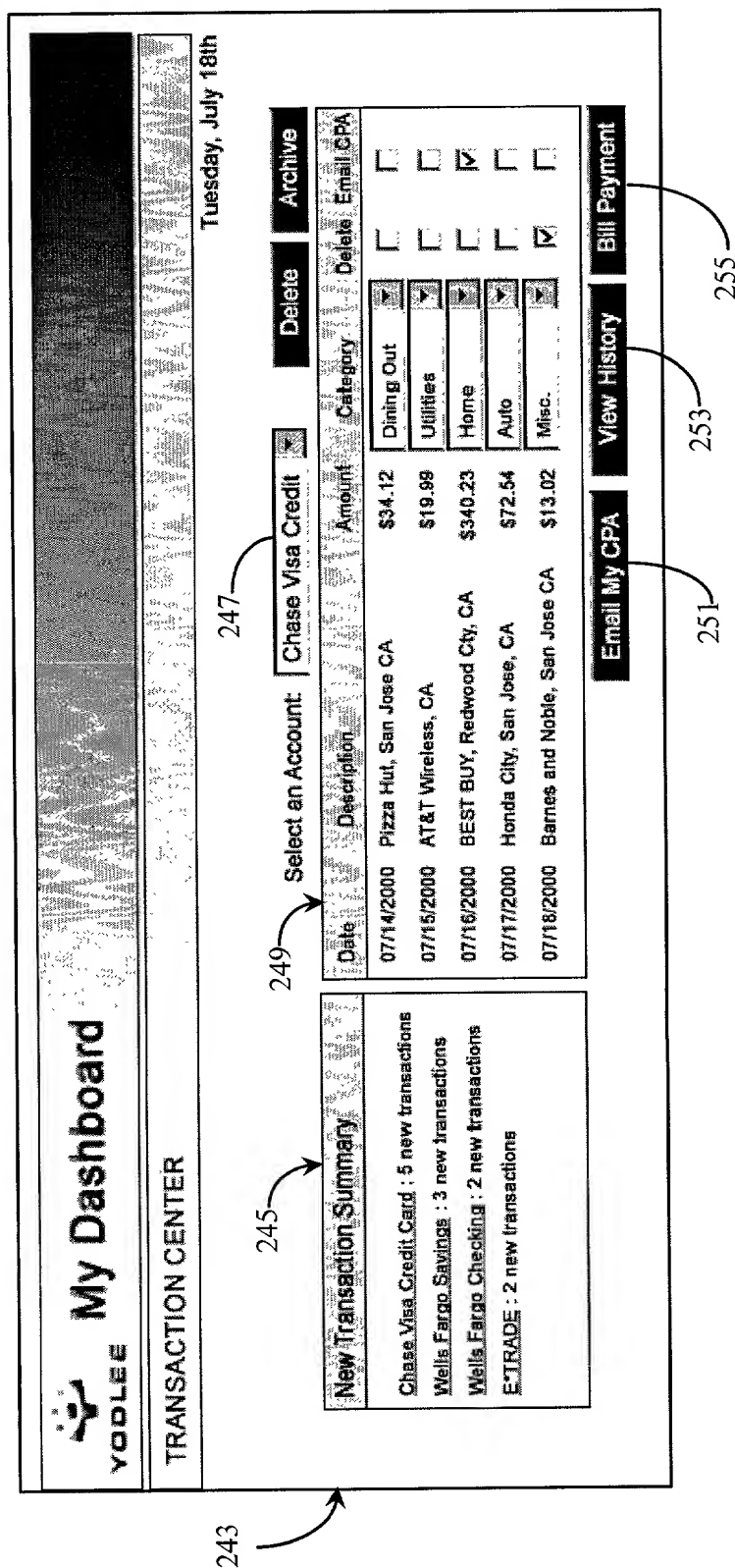


Fig. 12



**Fig. 13**

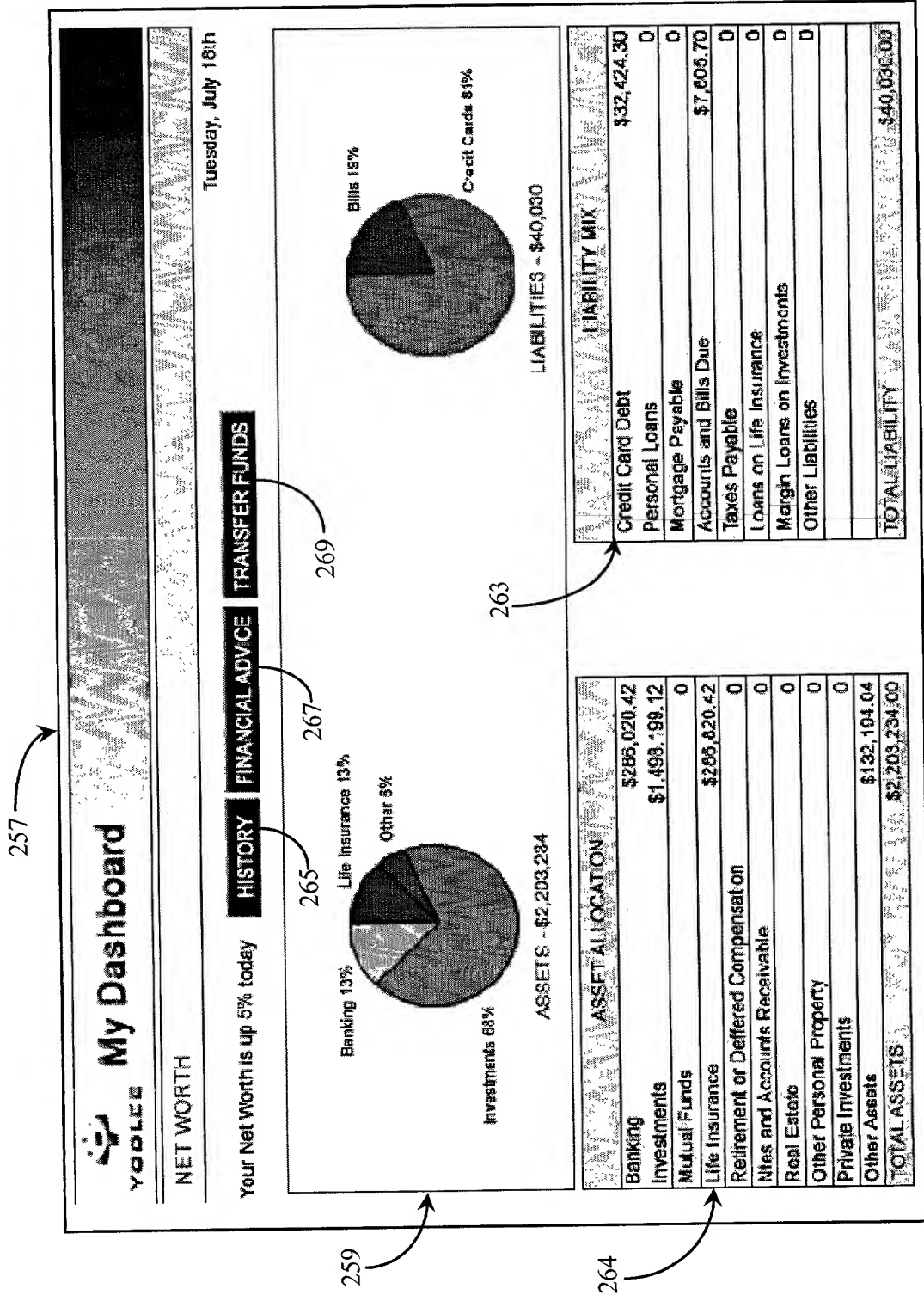


Fig. 14



271 →

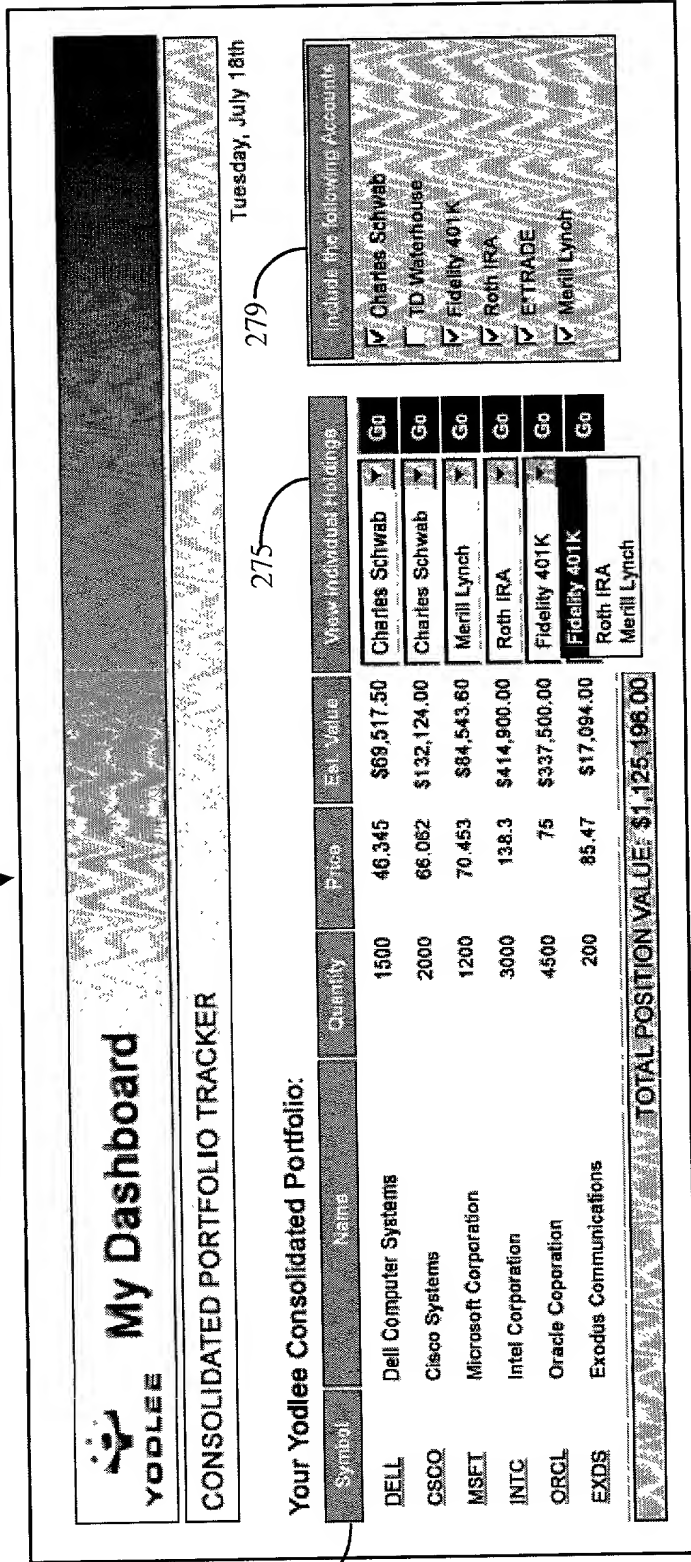
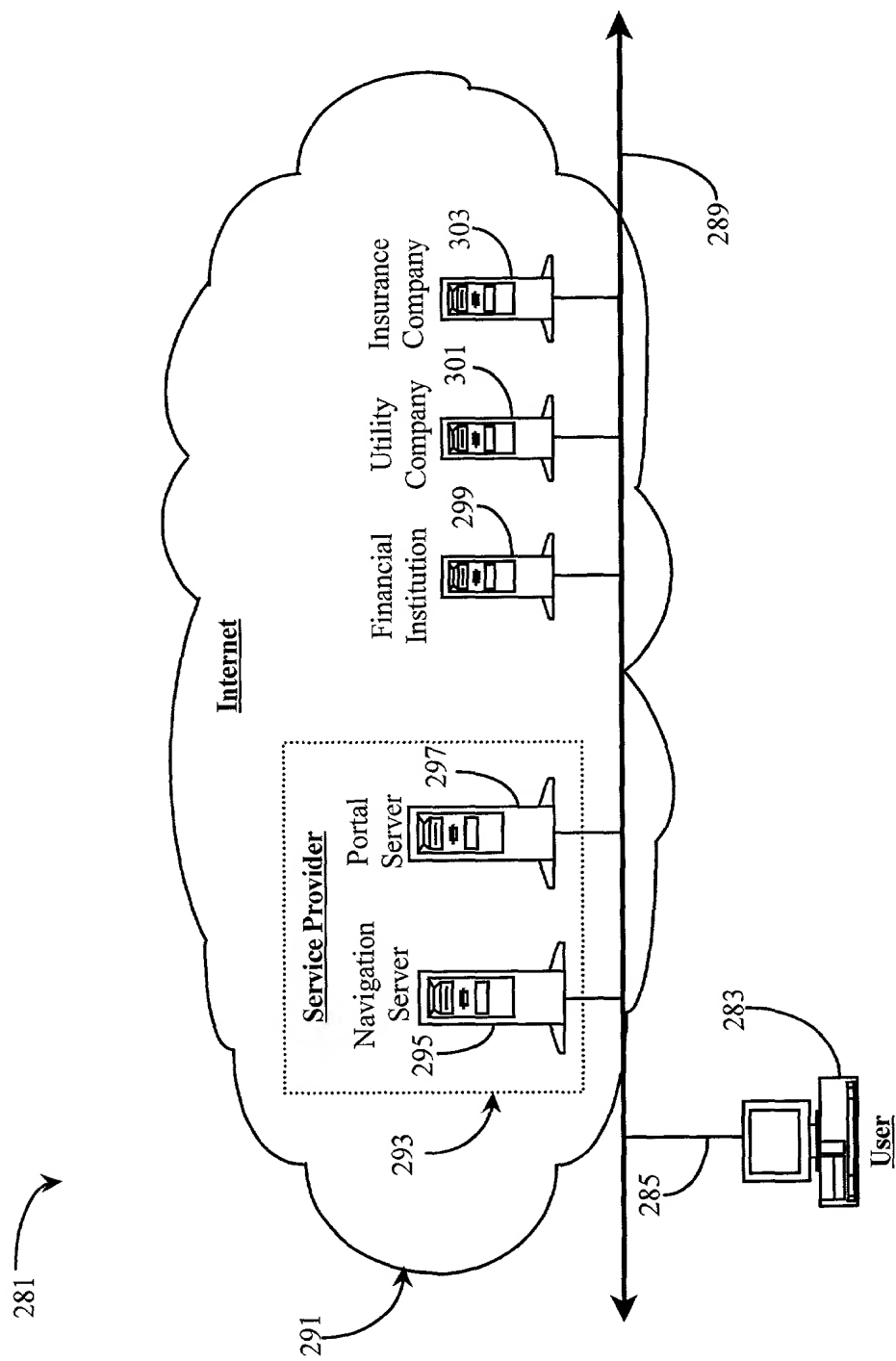


Fig. 15



**Fig. 16**





# Transaction Center - Default View

TRANSACTION CENTER

New Transaction Summary

All Accounts: 12 new transactions

Chase Visa Credit Card: 5 new transactions

Wells Fargo Savings: 3 new transactions

Wells Fargo Checking: 2 new transactions

E\*TRADE: 2 new transactions

New Transactions: All Accounts

Date	Description	Account	Amount	Category
07/14/2000	Pizza Hut, San Jose, CA	Chase Visa Credit Card	\$34.12	Food and Beverage
07/15/2000	AT&T Wireless, CA	Wells Fargo Savings	\$10.00	Utilities
07/16/2000	BEST BUY, Redwood City	Wells Fargo Checking	\$340.23	Home
07/17/2000	Honda City, San Jose, CA	Wells Fargo Checking	\$72.54	Auto
07/18/2000	Princeton College, San Jose, CA	E*TRADE	\$100.00	Charitable Contribution

Save Categories

Transaction History

Bill Payment

Fig. 18

## Transaction Center: One Account View

TRANSACTION CENTER

New Transaction Summary

Chase Visa Credit Card : 5 new transactions  
Wells Fargo Savings : 3 new transactions  
Wells Fargo Checking : 2 new transactions  
E-TRADE : 2 new transactions

New Transactions: Chase Visa Credit Card

Date	Description	Amount	Category
07/14/2000	Pizza Hut, San Jose CA	\$34.12	Food and Beverage
07/15/2000	AT&T Wireless, CA	\$19.99	Utilities
07/16/2000	BEST BUY, Redwood City, CA	\$340.23	Home
07/17/2000	Honda City, San Jose, CA	\$72.54	Auto
07/18/2000	Pomona College, San Jose CA	\$100.00	Charitable Contribution

Save Categories

Transaction History

Bill Payment

Fig. 19

# Transaction Center: Transaction History / All Accounts

TRANSACTION HISTORY

Select an Account:

All Accounts

Chase Credit Card

American Express

BankOne Checking

Select a Timeframe:

YTD

This Month

Last 6 months

Last 12 months

Select a View:

By Category

Chronological

Auto

Charitable Contributions

Entertainment

Food and Beverage

329

331

Display

325

327

324

Date	Description	Category	Amount	Chart It
01/03/00	Payment to Bob Formichi	Housing	\$1,800.00	
01/03/00	Final Final	Food and Beverage	\$27.85	
01/03/00	The Fillmore	Entertainment	\$154.32	
01/05/00	Brake Repair Shop	Auto	\$553.36	
02/04/00	Payment to Bob Formichi	Housing	\$800.00	
02/04/00	Shoreline Amphitheater	Entertainment	\$88.44	
03/04/00	Big O Tires	Auto	\$432.21	
03/06/00	TicketMaster	Entertainment	\$145.34	
03/06/00	Payment to Bob Formichi	Housing	\$800.00	
04/07/00	Clamnetlines	Food and Beverage	\$167.67	
04/15/00	American Heart Association	Charitable Contributions	\$200.00	
04/31/00	Great American Music Hall	Entertainment	\$198.20	
04/31/00	Payment to Bob Formichi	Housing	\$800.00	
<b>Expenses</b>			<b>\$5,067.39</b>	

333

335

Edit Categories

Fig. 20



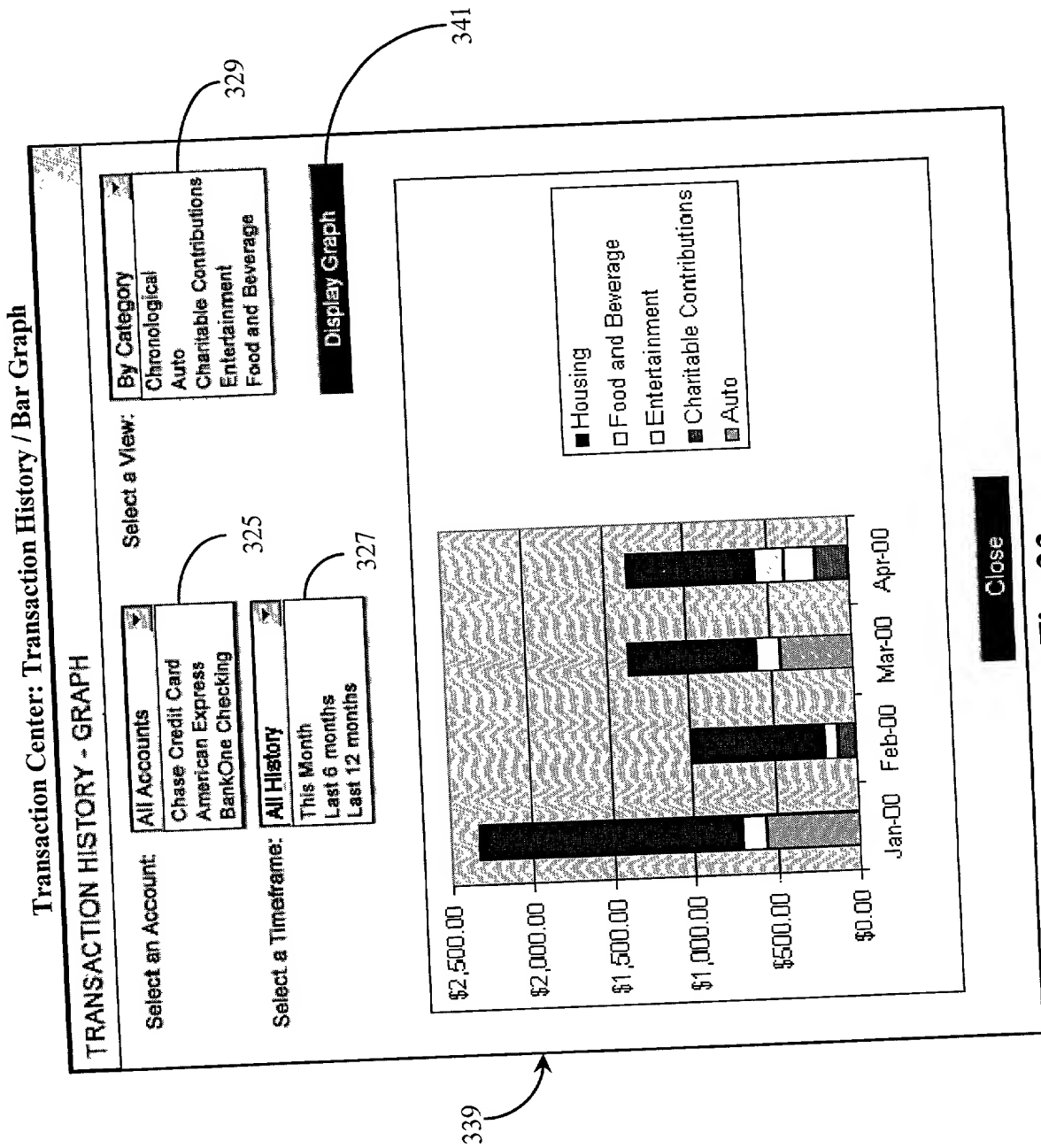


Fig. 22

# Transaction Center: Transaction History / Line Graph

## TRANSACTION HISTORY - GRAPH

Select an Account:

- All Accounts
- Chase Credit Card
- American Express
- BankOne Checking

Select a Timeframe:

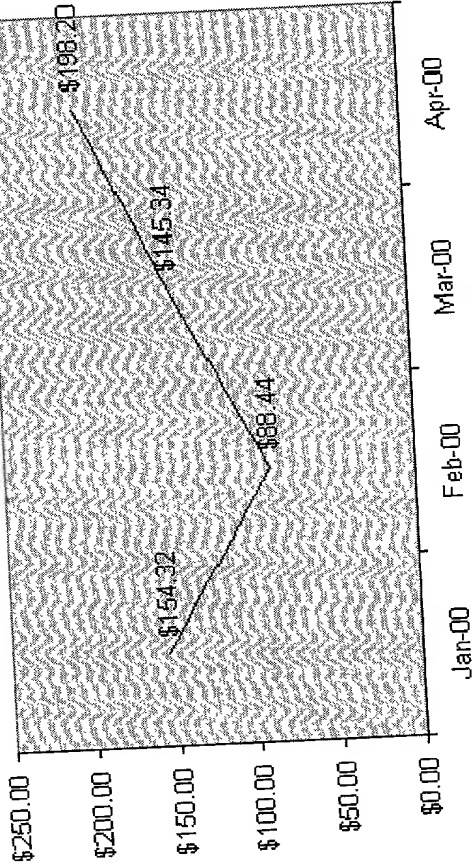
- All History
- This Month
- Last 6 months
- Last 12 months

Select a View:

- Entertainment
- Chronological
- Auto
- Charitable Contributions
- By Category
- Food and Beverage

Display Graph

— Entertainment



Close

Fig. 23

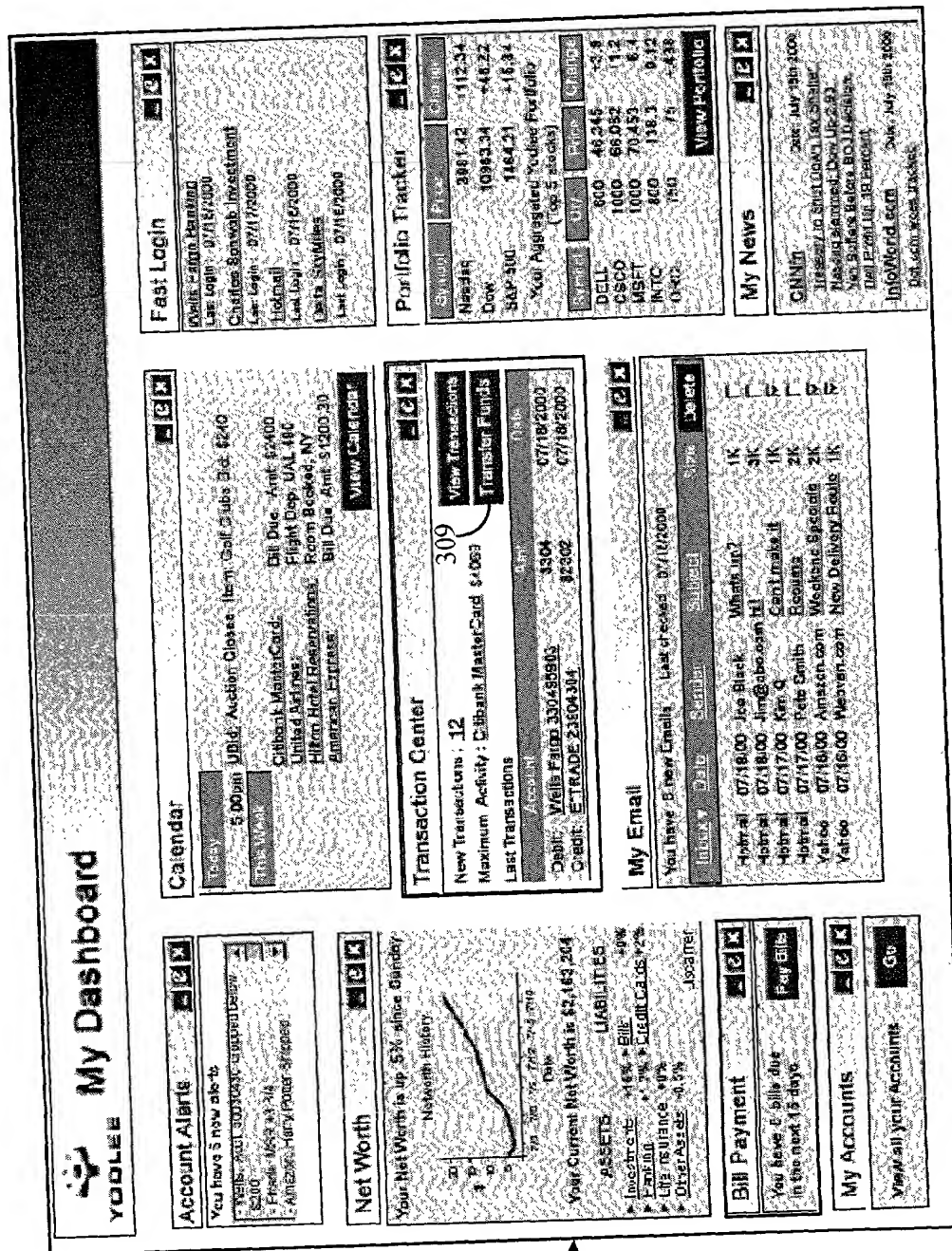


Fig. 24



## Transfer Funds

**Transfer Funds**

**FROM:**  
**TRANSFER:** \$500  
**ON:** 09/22/00

**TO:**  
BankOne - 2398036798  
BankOne - 2398036798  
E\*TRADE - 98765-43xx  
Wells Fargo Banking - 1234567-xxx  
Wells Fargo Banking - 7374846-xxx

**Buttons:** Add a New Account, Cancel, Transfer Funds

---

**Pending Transfers**

Transfer Date	From	To	Amount
09/03/00	Wells Fargo Banking 1234567890-xxx	E*TRADE 987654321-xxx	\$5000.00

**Inquire**

---

**Last 10 Transactions**

Date	Status	From Account	Payee	Amount
08/08/00	Pending	Wells Fargo Banking	Funds Transfer to E*TRADE	\$5000.00
08/12/00	Complete	Fidelity MMA	Landlord	\$1,500.00
08/11/00	Complete	Wells Fargo Checking	AT&T	\$32.67
08/11/00	Complete	Wells Fargo Checking	PacBell	\$33.06
08/10/00	Complete	PayPal	John Smith	\$100.00
08/10/00	Complete	Fidelity MMA	State Farm Insurance	\$240.00
08/04/00	Complete	Prudential	Funds Transfer to E*TRADE	\$1,000.00
08/05/00	Complete	E*TRADE	Funds Transfer to BankOne	\$500.00
08/02/00	Rejected	PayPal	Patty Neal	\$32.15
08/02/00	NSF	ChBank Mastercard	CitiBank Checking	\$1,032.10

**More Transactions**

---

**Active Balance**

Wells Fargo Banking - 1234567-xxx	Current Balance	\$3,200.26
Wells Fargo Mastercard	(\$2,400.00)	
	<b>Final Balance*</b>	<b>\$600.26</b>

---

**View Balances**

BankOne - 2398036798	Current Balance.	\$2,204.21
American Express:	(\$1,000.00)	
	<b>Final Balance:</b>	<b>\$1,204.21</b>

### Edit Account List

Edit Account Lists

☐

American Express - 3333-3333-3333-xxxx

☐

BankOne - 12333-33xxx

☐

Chase Mastercard - 1234-4567-3456-xxxx

☐

Fidelity Investments - T9999-3333

☐

Wells Fargo Banking - 12345678-xxx

OK

Cancel

359

Fig. 26

100150 224560

### Account Information

ACCOUNT INFORMATION

We need some additional information to complete this transaction

Enter your complete Wells Fargo Account Number  
1234567-888

Enter your complete BankOne Account Number  
9876543-xxx

Enter your BankOne Routing Number  
(this is the 9 digit number on the bottom of your check)

OK

Cancel

361

Fig. 27

100750 2224560

Account Information - Confirmation

TRANSFER CONFIRMATION

You have requested the following transaction

Transfer \$500 from Wells Fargo Banking - 1234567-888  
to BankOne - 2398036798  
Routing # 987987987 on 09/20/00

Please confirm these fund transfer details:

OK

Edit

Cancel

363

Fig. 28